

# PEOPLE COMMUNITY ENVIRONMENT



2021 Corporate  
Social Responsibility

*Kathy Bejma, Diane Garvey, Sol Choi,  
Jim Javorcic – CBIZ Chicago*

# TABLE OF CONTENTS

<b>A LETTER FROM OUR CEO</b> .....	<b>3</b>	<b>OUR COMMUNITY</b> .....	<b>16</b>
<b>CBIZ SNAPSHOT</b> .....	<b>4</b>	Service.....	16
<b>OUR COMPANY</b> .....	<b>5</b>	Fundraising.....	17
Mission Statement.....	5	National Food Drive.....	17
Vision Statement.....	5	CBIZ Women’s Advantage & Dress for Success.....	18
Core Values.....	5	<b>OUR ENVIRONMENT</b> .....	<b>19</b>
Service Promise.....	5	Green Team.....	19
Board of Directors.....	6	2021 Green Team Metrics.....	19
Corporate Governance.....	7	Ecosia.....	20
Human Rights Policy.....	7	The Water Project.....	20
Professional Conduct & Ethics.....	8	Earth Day Contest.....	20
<b>OUR PEOPLE</b> .....	<b>9</b>	Sustainability Policy.....	20
Value Proposition.....	9	<b>APPENDICES</b>	
Our Pledge.....	9	Appendix A: Human Rights.....	22
Workplace Awards.....	10	Appendix B: Enterprise-Wide Training Brochure.....	24
Recognition.....	11	Appendix C: Recognized Professionals.....	35
Steven L. Gerard Legacy Award.....	11	Appendix D: Employee Benefits Program.....	37
Learning & Development.....	11	Appendix E: CWA DFS Infographic.....	42
Experience.....	11	Appendix F: Sustainability Policy.....	44
Diversity & Inclusion.....	12	Appendix G: SASB Disclosures.....	46
Diversity Metrics.....	14		
Employee Engagement.....	15		
Benefits.....	15		



# A LETTER FROM JERRY GRISKO



## A Letter from Our President & CEO, Jerry Grisko



In 2021, we marked an important milestone as we celebrated our 25th anniversary. From the very start of our company's journey and through the continuous growth we've experienced over the last 25 years, our commitment to corporate citizenship has remained an essential component of our mission, vision and core values. Over the last year, we achieved historic growth in nearly every aspect of our business while simultaneously investing in our people, our communities and our future.

Our more than 6,000 team members are the heart of our business, and our continued

investments in learning and development, employee experience and engagement, recognition and mentoring are central to our goal of being our team members' employer of choice.

CBIZ had a historic year in securing a record 93 workplace awards, including best place to work and top industry workplace, best internship, and recognition for our efforts to promote the health and well-being of our team. We continue to make progress in our efforts to advance diversity and inclusion as we take steps to attract, retain and promote diverse talent and build a more inclusive culture.

Our exceptional growth in 2021 was matched by the incredible generosity of our team. Through hundreds of hours of volunteer service and significant fundraising, our team supported countless nonprofit organizations across our communities. Nationally, we exceeded the goals for both our annual food

drive and our campaign to support Dress for Success, our partner through CBIZ Women's Advantage. We continue to find new opportunities to give back and make a difference in the communities we serve.

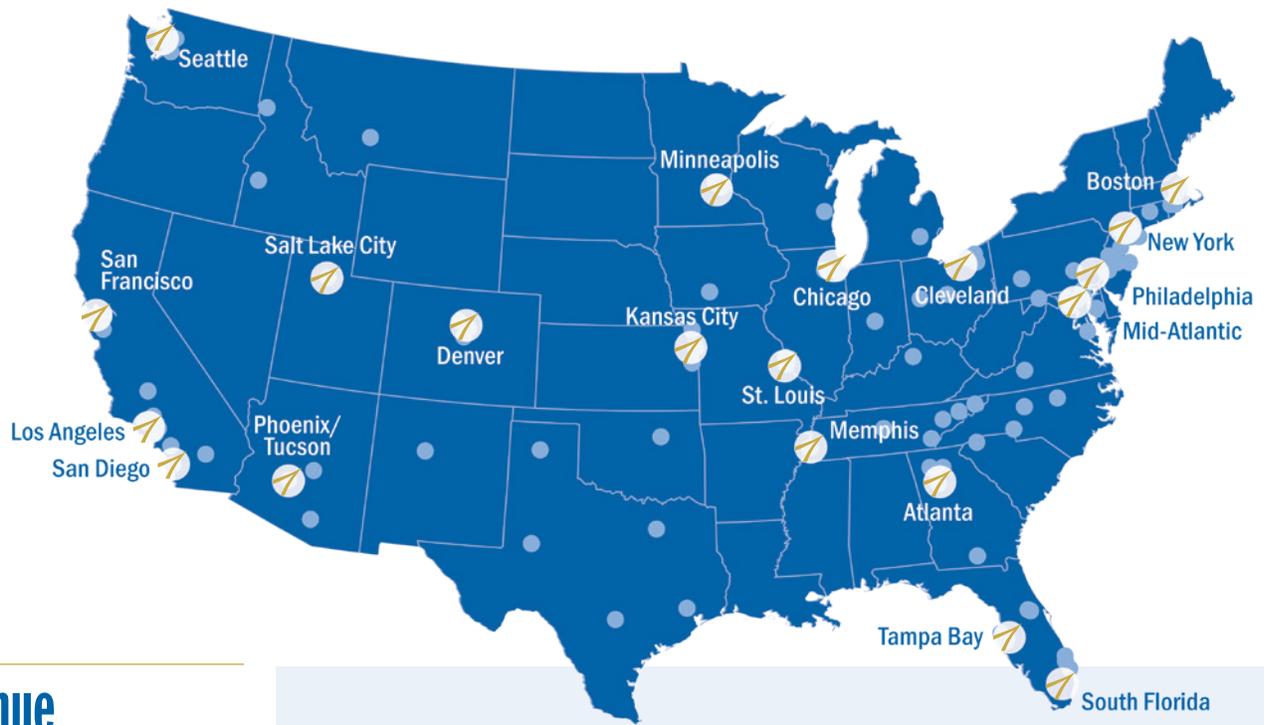
Finally, our 2021 report outlines how CBIZ is working to protect the environment through our day-to-day operations, engagement with our teams and special initiatives. For example, we prioritized the latest in green building techniques in the construction of our new corporate headquarters, which will open in 2023.

In so many ways, 2021 was a momentous year for CBIZ. Our achievements are a testament to the incredible dedication and efforts of our team to support our clients, communities and each other. I am proud to celebrate our progress in our fourth annual Corporate Social Responsibility report.

A handwritten signature in blue ink that reads 'Jerome P. Grisko Jr.'.

Jerome P. Grisko, Jr.,  
President & Chief Executive Officer, CBIZ, Inc.

# CBIZ SNAPSHOT



revenue

**\$1B+**

market cap

**\$2B+**

team members

**6,000+**



**20**

major markets



**100+**

offices



**93**

workplace awards



**CBZ**

NYSE

# OUR COMPANY



## Mission Statement

To provide exceptional advice and solutions that help our clients achieve their goals

## Vision Statement

To be recognized by our clients as the premier provider of accounting, insurance and other professional business services and by our team members as their employer of choice

## Core Values

- We do the right thing.
- Our people matter.
- We are dedicated to the success of our clients.
- We expect to win.
- We are OneCBIZ.



## Our Guarantee

If you are not satisfied with our **responsiveness and the service** we have provided, tell us immediately – we will correct the situation to your satisfaction.

## Service Promise

**Quality, Attentive, Responsive Business Services:** We pledge to provide quality, attentive, responsive business services.

**Individual Attention:** We will treat each client with the utmost care; we will develop and maintain a strong personal relationship; we will provide service with a commitment to professionalism, trust and the highest level of personal and professional integrity.

**Responsive:** We will respond to a client's urgent need immediately; we will return all voicemail and email communications within 24 hours; we will deliver and review all work product on a timely and as-agreed basis.

**Proactive:** We are committed to understanding the goals and needs of our clients, responding to such needs with our best service, advice and products. We will strive to provide our clients with innovative solutions and opportunities to improve and grow their business.

# OUR COMPANY

## Board of Directors

Please visit [cbiz.com/about-us/board-of-directors](http://cbiz.com/about-us/board-of-directors) for more information on our Board of Directors.



*Steven L. Gerard, Chairman*



*Rick L. Burdick, Lead Director*



*Michael H. DeGroot*



*Joseph S. DiMartino*



*Gina D. France*



*Jerome P. Grisko Jr.*



*Sherrill W. Hudson*



*Richard T. Marabito*



*A. Haag Sherman*



*Todd J. Slotkin*



*Benaree Pratt Wiley*

# OUR COMPANY

## Corporate Governance

As a publicly traded company, it is CBIZ's goal to conduct our business in a manner that will maintain and improve our good reputation. To provide shareholders with more information regarding how we hope to achieve our goal, CBIZ has made the following charters available: Audit Committee, Compensation and Human Capital Committee, and our Nominating and Governance Committee. To view these charters, please visit [cbiz.com/corporate-governance-highlights](https://www.cbiz.com/corporate-governance-highlights).



*Alyson Phillips –  
CBIZ Denver*



*John Hill, Mary Delgado, Leia Tabert, Betty Liu  
and Caroline Zheng – CBIZ Los Angeles*

## Human Rights Policy

Please refer to [Appendix A](#) for a complete copy of our Human Rights Policy.

# OUR COMPANY

## Professional Conduct & Ethics

The success of CBIZ is directly tied to our reputation for integrity in the marketplace. We earn loyalty and trust because we are honest, dependable, reliable and responsible. We adhere to the highest ethical standards, more than merely required by law or expected by others, because it is the right thing to do and makes good business sense. We take great pride in our reputation for integrity.

We act with integrity by incorporating the values of honesty, fairness, respect, loyalty and cooperation into all of our business decisions and actions.

These values serve as the foundation for the following ethical business principles:

- We treat people with dignity and care.
- We transact business fairly and honestly, promoting the Company's best interests, without regard to our personal interests.
- We safeguard all of the Company's property and information and treat others' property and information with the same respect.
- We work to enhance the quality of life in the communities we serve.
- We comply with the law.

To guide team members to make the best possible decisions, CBIZ has created a Code of Professional Conduct and Ethics Guide. Although not a detailed manual for resolving every question or conflict, the Code of Professional Conduct and Ethics Guide has been designed to provide guidance about the way associates are to do business every day. It is the responsibility of our team members to read and understand the Code, as well as other CBIZ policies and guidelines, and comply with them both in letter and spirit.

In addition, all newly hired employees are required to complete a two-part ethics course within their first 10 days of employment, with refresher versions assigned every few years.

Please visit [cbiz.com/corporate-governance-highlights](https://www.cbiz.com/corporate-governance-highlights) to view our Code of Professional Conduct and Ethics.

### WHISTLEBLOWER HOTLINE

The CBIZ Whistleblower Hotline is available 24 hours a day, seven days a week. Callers remain anonymous, and any employee who reports possible or actual wrongdoing in good faith will not be retaliated against if they choose to share their identity. Associates may report a complaint by calling 1-866-255-2611 or by visiting the Security Voice website at [securityvoice.com/reports](https://www.securityvoice.com/reports). The CBIZ Internal Audit Department provides the Audit Committee with a report of all complaints received and the results of its investigation.



Whistleblower  
Hotline  
  
1-866-255-2611

### TERMS OF USE & PRIVACY

To view our Terms of Use & Privacy Policy, please visit [cbiz.com/terms-conditions](https://www.cbiz.com/terms-conditions). Our Website Privacy Policy is available at [cbiz.com/privacy-policy](https://www.cbiz.com/privacy-policy).



Sadarhi Cowan, Angela Link, Diamond Green - CBIZ Glen Allen, VA

# OUR PEOPLE

## Value Proposition

At CBIZ, our value proposition to our clients is the breadth of our services and the depth of our expertise, including our unique ability to provide multi-disciplinary, coordinated solutions that respond to the complexity and uncertainty of today's business environment. CBIZ brings value because of the talent, expertise and commitment of the more than 6,000 team members who make up our national team.

“Our People Matter” is one of our five core values and is evident in our efforts to be our team members’ employer of choice.



## Our Pledge

1

Commit to the personal and professional growth of our team members

2

Respect individuality and diversity and extended dignity to all

3

Value and recognize hard work, efforts and contributions of our team members

4

Support the communities in which our team members live and work

5

Understand the balance among our personal, community and professional lives



# OUR PEOPLE



**93** workplace awards in 2021



## National Workplaces

- 2021 America's Best Mid-Size Employers
- 2021 Best Places to Work in Insurance
- 2021 Herbert Riley Corporate Citizen Award
- 2021 Top 101 Best & Brightest Companies in the Nation
- 2021 Top Entry Level Employer
- 2021 Top Intern Employer
- 2021 Top Workplaces USA – Appreciation, Clued-In Leaders, Employee Value Proposition, Empowering Employees, Financial Services Industry, Formal Training, Professional Development and Work-Life Flexibility
- 2021 U.S. Insurance Awards – Community Outreach Project of the Year



## Local Office Workplaces

- |                     |                          |                       |
|---------------------|--------------------------|-----------------------|
| ■ Akron, OH         | ■ Encino, CA             | ■ Providence, RI*     |
| ■ Alpharetta, GA*   | ■ Greenwood Village, CO* | ■ Salt Lake City, UT  |
| ■ Atlanta, GA*      | ■ Indianapolis, IN       | ■ San Diego, CA*      |
| ■ Boca Raton, LA*   | ■ Irvine, CA             | ■ San Francisco, CA*  |
| ■ Boise, ID         | ■ Lawrenceville, NJ      | ■ San Jose, CA*       |
| ■ Boston, MA        | ■ Los Angeles, CA        | ■ San Luis Obispo, CA |
| ■ Brentwood, TN     | ■ Minneapolis, MN        | ■ Seattle, WA         |
| ■ Chicago, IL*      | ■ Naperville, IL*        | ■ Solon, OH           |
| ■ Cleveland, OH     | ■ Nashville, TN          | ■ St. Petersburg, FL* |
| ■ Columbia, MD      | ■ New York City*         | ■ Tampa, FL           |
| ■ Delray Beach, FL* | ■ Owings Mills, MD       | ■ Tucson, AZ*         |
| ■ Denver, CO*       | ■ Oxnard, CA             | ■ Uniontown, OH       |
| ■ East Windsor, NJ  | ■ Philadelphia, PA       | ■ Walnut Creek, CA*   |
|                     | ■ Phoenix, AZ*           | ■ Westlake, OH        |
|                     | ■ Pleasant Hill, CA*     | ■ Woodstock, GA*      |



## Local Well-Being

- |                    |                     |                          |
|--------------------|---------------------|--------------------------|
| ■ Akron, OH        | ■ Dublin, OH        | ■ New Providence, NJ     |
| ■ Alpharetta, GA   | ■ Fairborn, OH      | ■ New York City          |
| ■ Atlanta, GA      | ■ High Point, NC    | ■ Overland Park, KS*     |
| ■ Austin, TX       | ■ Houston, TX       | ■ Palm Beach Gardens, FL |
| ■ Boca Raton, FL   | ■ Irvine, CA        | ■ Philadelphia, PA       |
| ■ Boston, MA       | ■ Kansas City, MO*  | ■ Phoenix, AZ            |
| ■ Brentwood, TN    | ■ Knoxville, TN     | ■ Providence, RI         |
| ■ Chicago, IL      | ■ Lawrenceville, NJ | ■ San Antonio, TX        |
| ■ Cleveland, OH    | ■ Los Angeles, CA   | ■ San Diego, CA          |
| ■ Cleveland, TN    | ■ Memphis, TN       | ■ Solon, OH              |
| ■ Dallas, TX       | ■ Midland, TX       | ■ St. Louis, MO          |
| ■ Delray Beach, FL | ■ Minneapolis, MN   | ■ Uniontown, OH          |
| ■ Denver, CO       | ■ Murfreesboro, TN  | ■ Westlake, OH           |
|                    | ■ Naperville, IL    | ■ Woodstock, GA          |



## Certifications & Rankings

- 2021 Great Place to Work Certification
- 2021 Top 100 Brokers List
- 2021 Top 100 Accounting Firms
- Barron's 2021 Top 50 Institutional Consulting Teams
- 2022 Vault Accounting 50
- 2021 & 2022 America's Best Tax Firms
- 2021 & 2022 America's Best Accounting Firms
- 2022 Vault Most Prestigious Accounting Firms
- 2022 Vault Best Accounting Firms for Audit & Assurance\*\*
- 2022 Vault Best Accounting Firms for Forensic Accounting
- 2022 Vault Best Accounting Firms for Tax Accounting
- 2022 Vault Top 100 Best Internships
- 2022 Vault Best Accounting Internships
- 2022 Best Internships for Quality of Life, Training & Mentoring and Real-Life Experience



## National Well-Being

- 2021 Best and Brightest Companies in Wellness
- 2021 Top Workplaces USA – Employee Well-being

\*Indicates multi-award winner

\*\*MHM is an independent CPA firm providing audit, review and attest services, and works closely with CBIZ, a business consulting, tax and financial services provider.

# OUR PEOPLE

## Recognition

Recognition of our team members' hard work and contributions is an important part of their experience. We recognize and celebrate key milestones through our Service Anniversary Program. This program honors team members reaching 5, 10, 15, 20, 25 years and other significant anniversaries.

We are proud of the recognitions our professionals have received within their industries and communities. Annually, a growing number of CBIZ team members are recognized externally for their accomplishments. Please refer to [Appendix C](#) for a list of those recognized in 2021.

## Steven L. Gerard Legacy Award



The Steven L. Gerard Legacy Award (SLG Award) was established in 2016 to honor the impact and contributions of our former Chief Executive Officer during his tenure with the company. This award is peer-nominated and focuses on how a team member exemplifies CBIZ's core values.

*James Harmon*

Each year, nominees from across the company are recognized for this special honor. Our 2021 SLG Award recipient was James Harmon, Business Unit President within our CBIZ Employee Benefits group in Westlake, Ohio.

## Learning & Development

CBIZ is proud of its efforts to be a learning organization that provides opportunities for education, technical training, professional development, leadership development, and coaching and awareness at every step in a team member's career. These opportunities are offered through in-person, virtual and on-demand programs. We welcome new team members through a comprehensive process that includes preparation for their role, engagement with our team and culture, and access to a variety of CBIZ resources and supports. Please refer to [Appendix B](#) for our Enterprise-Wide Training brochure.



## Enterprise-Wide Training Brochure

For detailed information about content and types of training, please refer to [Appendix B](#) for our Enterprise-Wide Training Brochure.

## Experience

### OUR 'GREAT PEOPLE, GREAT PLACE' PROGRAM

Our commitment to our people means making CBIZ a great place to work. More than 15 years ago, we established the Great People, Great Place (GP2) program with the goal of strengthening our culture, connecting our team members and supporting each other. Each year, GP2 sponsors a variety of events, activities and initiatives within our offices and teams.



*Tait Miller, Mailen Ferreyra, Mitch Horne, Zack Bryant, Branden Whitehead, Vanessa Coburn – CBIZ Salt Lake City*

# OUR PEOPLE

## Diversity & Inclusion

CBIZ continues to make important progress in our efforts to accelerate diversity and inclusion and to develop a more inclusive culture where all team members feel a sense of belonging. During 2021, our Diversity and Inclusion Task Force, a nimble group of leaders from across CBIZ, led a strategic planning process with the help of an external consultant as a step toward establishing a comprehensive and long-term diversity and inclusion strategy. The resulting strategy will launch in 2022 and aligns with our commitments as a signatory of the CEO Action for Diversity and Inclusion pledge, the largest CEO-driven business commitment to advance diversity and inclusion within the workplace.

In addition to this planning effort, we continue to support a variety of initiatives focused on team member retention, engagement, recruitment and building awareness of the importance of diversity



Yesenia Lozoya and Joni Deiters -  
CBIZ BTZ, San Diego



CBIZ Diversity and Inclusion Task Force. Back row: Steve Sublett, Andy Burczyk, Jeff Booker, Elizabeth Newman, Dan Seff. Front row: Tami Bolder, Dee Menon, Tami Bensky

and inclusion as a business imperative. During 2021, we launched the *Our People Matter Speakers Series* that spotlights diverse voices and experiences with external speakers, authors and team members. We also established a dedicated diversity and inclusion resource featured on our CBIZ Central intranet platform. The site makes a variety of resources, including books, articles, videos, podcasts and more, accessible on demand to our team members while also highlighting and celebrating important cultural events such as Black History Month, Pride Month and Juneteenth. Our team members are encouraged to recommend resources meaningful to them that can be shared with peers through the site.

Over the last year, we expanded our diversity and inclusion training offerings

to include additional required courses on the impact of unconscious bias in the workplace and how we can all work toward a more inclusive culture. Our latest training course focuses on identifying, responding to and preventing microaggressions in the workplace. We also introduced an extended learning series as an optional opportunity for our team members to continue to explore the issues and concepts raised through our new trainings. During the second half of 2021, over 400 team members participated in the *Diversity and Inclusion Extended Learning Series* through facilitated discussion sessions designed to foster a safe space for courageous dialogue and questions.

Our CBIZ employee resource groups remain active and continue to grow.

# OUR PEOPLE

## Diversity & Inclusion (cont.)



### Women's Advantage

#### CBIZ Women's Advantage (CWA)

provides professional training, development, mentorship, recognition and career enhancement opportunities to our professionals, and

brings these same elements to our business communities through a variety of educational and networking events. In 2021, CWA introduced the *Women Transforming Business* annual award as an opportunity to recognize women leaders and deepen client relationships. CWA was also recognized as a global

corporate partner for Dress for Success, a distinction based on the level of engagement, fundraising and pro bono services provided to the organization. CBIZ consultants are now providing Dress for Success leaders from across the globe with leadership coaching as well as leadership development to build critical capacity within the organization after establishing the *Dress for Success Global Leadership University*.



**CBIZ Young Professionals (CYP)** focuses on early-career team members with the

goal of providing opportunities for growth and development aligned to long-term personal and professional goals and career paths. CYP continues to expand its national footprint to establish chapters in new geographies and in new teams. CYP launched an innovative mentorship pilot project that offers structured support and guidance to both mentees and mentors. The long-term goal of the mentorship pilot is to scale the concept companywide.

Building on the success of both CBIZ Women's Advantage and CBIZ Young Professionals, we will expand our employee resource group offerings in 2022.

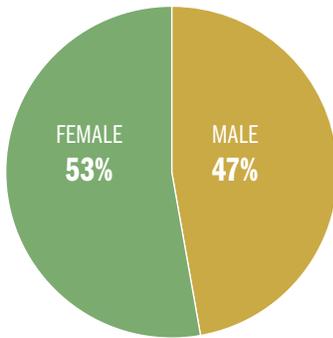


Abe Rivera, Kayla Hamm, Carrie Wileman, Phyllis Hoff, Ryan Kuryla, Kelly Powell – CBIZ St. Louis

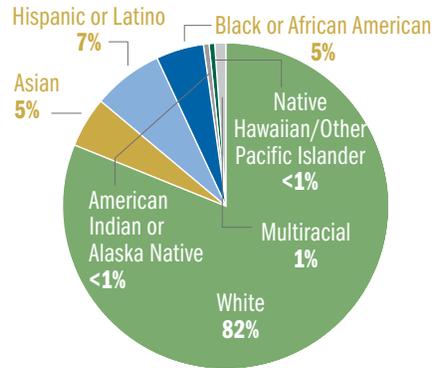
# OUR PEOPLE

## Diversity Metrics

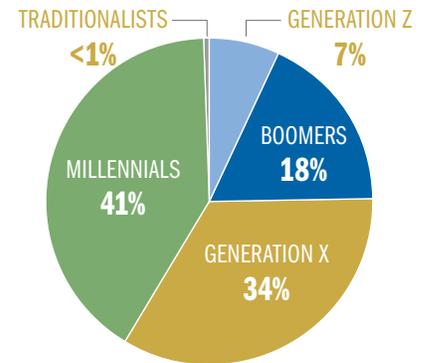
**PERCENTAGE OF TEAM MEMBERS BY GENDER**



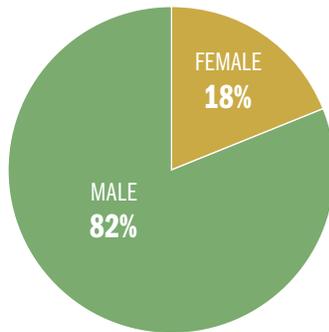
**PERCENTAGE OF TEAM MEMBERS BY ETHNICITY**



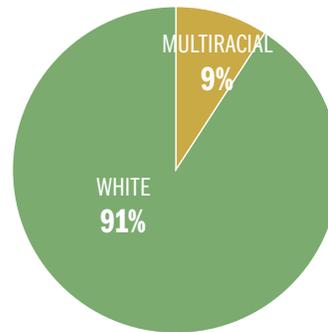
**PERCENTAGE OF TEAM MEMBERS BY GENERATION**



**PERCENTAGE OF BOARD OF DIRECTORS BY GENDER**



**PERCENTAGE OF BOARD OF DIRECTORS BY ETHNICITY**



# OUR PEOPLE

## Employee Engagement

Our more than 6,000 team members are the heart of the business, and we use companywide engagement surveys to gather feedback from our team on a routine basis. The resulting insights help to drive continuous improvement across our various employee programs as we strive to be our team members' employer of choice. Our annual survey ultimately informs all aspects of employee engagement, including learning and development, culture, recognition, flexibility, compensation and benefits. In 2021, we utilized a third-party survey for this purpose. Throughout the year, we also conduct 'pulse' surveys on specific topics or as part of program changes to gather timely feedback from our team.



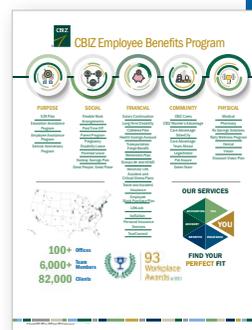
Emily Thapa - CBIZ Austin



Sol Choi, Grace Yang, Rahim Jaffer - CBIZ Chicago

## Benefits

We offer our team members a robust benefits package, including medical, dental and vision coverage. Each benefit is designed to improve or maintain the overall health of our team members. Please refer to [Appendix D](#) for a detailed overview of our benefits.



## CBIZ Employee Benefits Program

For detailed information refer to [Appendix D](#) for our CBIZ Employee Benefits Program.

# OUR COMMUNITY

We pride ourselves on being an organization that builds long-lasting relationships with and provides support to the communities in which we live and work as well as to national organizations. To fulfill this commitment, we launched our CBIZ Cares Program to encourage participation in volunteering, fundraising, our National Food Drive and our support of Dress for Success.

## Service

In honor of our 20th anniversary in 2016, we wanted to give back to the communities in which we live and work. We embarked on CBIZ Cares, a project designed to encourage all offices to have their team members volunteer up to five paid hours at a nonprofit selected by that CBIZ location. CBIZ Cares was such a success that we decided to make it an annual initiative!

As we continued to face the challenges of COVID-19 in 2021, we were cognizant of our team members' safety as well as restrictions by local governments nationwide, so we decided to offer two options for volunteering. For those in locations where restrictions were either eased or lifted, we encouraged team volunteering in large or small groups. For those in areas where restrictions continued or for our team members who felt uncomfortable in large gatherings, we supported individual volunteering.



# OUR COMMUNITY

## Fundraising

In addition to our national food drive and Dress for Success fundraising campaigns, CBIZ team members have supported a variety of local nonprofits throughout the year, including:

- American Red Cross
- American Heart Association
- Boys & Girls Clubs
- Cystic Fibrosis Foundation
- Dana Farber Cancer Institute
- Dress for Success
- Junior Achievement
- Make-A-Wish
- The Humane Society
- Shriners Hospital for Children
- United Way
- The Water Project

## National Food Drive

Our 2021 campaign consisted of four donation methods – food, cash or checks, an online donation platform and payroll deductions. For the seventh year in a row, our team members generously made donations equivalent to more than one million pounds of food.



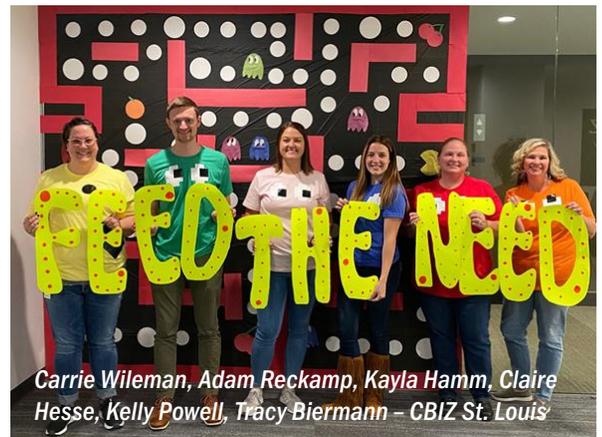
### POUNDS OF FOOD COLLECTED

2021	1,168,449
2020	1,005,159
2019	1,072,252
2018	1,021,586
2017	1,140,960
2016	1,051,864
2015	1,026,140
2014	747,743
2013	650,776
2012	648,034
2011	576,289
2010	462,099
2009	403,146

*More than 10 million pounds of food collected across the country*



*Blake Jacobs, Hannah Foust, Madison Cleveland, Johnathan Tankersley, Audrey Hager, Leigh Ellen Barnes, Vicki Bari – CBIZ Memphis*



*Carrie Wileman, Adam Reckamp, Kayla Hamm, Claire Hesse, Kelly Powell, Tracy Biermann – CBIZ St. Louis*



*Lucinda Torres, Shawna Cass, Cassandra Thomas, Betsy Sandoval, Scott Bellue, Tiffani Belford – CBIZ Woodstock, GA*

# OUR COMMUNITY

## CBIZ Women's Advantage & Dress for Success

Through our CBIZ Women's Advantage Program, we sponsor an annual campaign to benefit Dress for Success (DFS). DFS is an international nonprofit that empowers women to achieve economic independence by providing a network of support, professional attire and the development tools to help women thrive at work and in life.

Through the 2021 employee fundraising campaign, \$84,000 was donated to local U.S. affiliates, bringing the total to more than \$750,000 donated since the partnership began in 2008. CWA also established the Dress for Success Global Leadership University – *powered by CBIZ*.

Please refer to [Appendix E](#) for an infographic that further details our involvement with Dress for Success.



# OUR ENVIRONMENT

## Green Team

At CBIZ, we care about being environmentally friendly. In 2018, we renewed our commitment to our green initiatives and launched a national Green Team, comprised of volunteers from across CBIZ who are passionate about enhancing our green efforts. Our goal is to establish practical and actionable solutions to support sustainable environments within each of our local offices.

### We value:

- Reducing our environmental footprint
- Efficiently using resources to reduce waste
- Making green choices

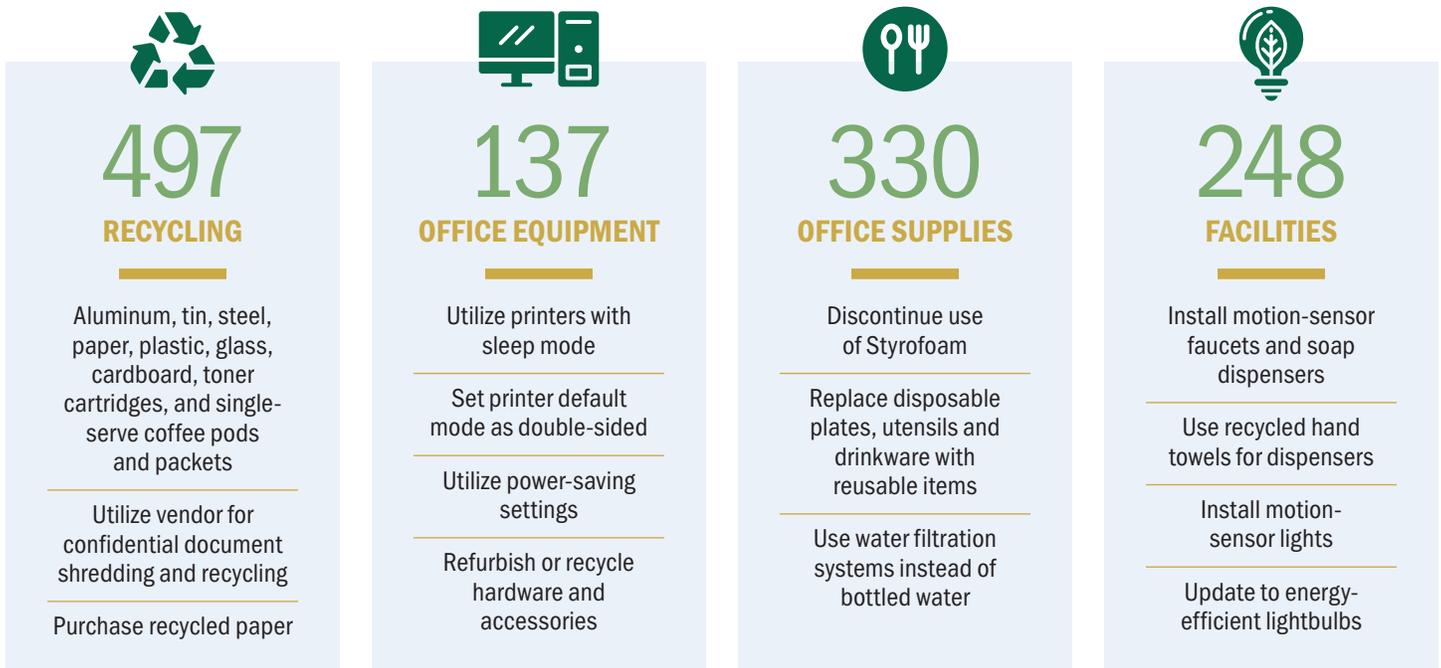
### We endeavor to do this because our team members care about working in a great place that values:

- Restoring and protecting our environment
- Opportunities for making green choices



## 2021 Green Team Metrics

Recycling, office equipment, office supplies and facilities are the four components of our green efforts. Each year, Green Team leaders help to implement and track efforts within these categories to make their office more environmentally friendly. The graphic below illustrates our 2021 actions.



# OUR ENVIRONMENT



## Ecosia

In July 2021, we asked our team members to install Ecosia, a zero-cost search engine that donates at least 80% of its profits from ad revenue to plant trees where nature and people need them most. The Ecosia community has already planted over 127 million trees in biodiversity hotspots. In a few short months, CBIZ team members completed over 28,000 searches, resulting in 950 trees planted.



## The Water Project

In Summer 2021, CBIZ partnered with The Water Project to fund a borehole well and hand pump at St. Paul's Ebusia Secondary School in Kenya. There are more than 650 students and teachers, including a boarding section of 155 students. With water needs ranging from drinking, cleaning, handwashing, showering and laundry, the school faced a high daily demand for water and fell short of meeting their needs. The project consisted of construction of the new well and installation of six new ventilated improved pit (VIP) latrines, three for the girls and three for the boys.

## Earth Day Contest

In honor of Earth Day, the CBIZ National Green Team held their first annual Earth Day Artwork Contest. The contest was open to team members' children and grandchildren in grades kindergarten through eight. Children were asked to create an original drawing that symbolized a message about environmental awareness. While paper drawings were permitted, we encouraged original drawings created by hand on a computer or tablet to further support our environmental efforts. The only requirement was for the drawing to include "CBIZ." The grand prize was publication of their drawing in our 2021 CBIZ Corporate Social Responsibility Report.



**WE CONGRATULATE OUR WINNER, ABBY HAWN, DAUGHTER OF WENDY HAWN OF CBIZ TAMPA BAY.**

## Sustainability Policy

Please refer to [Appendix F](#) for a copy of our Sustainability Policy.

# APPENDIX A

## Human Rights Policy

---

## HUMAN RIGHTS POLICY

CBIZ, Inc. is committed to providing a work environment that is safe and free from unlawful discrimination and harassment in any form. We are committed to creating an inclusive culture and a supportive workplace in which our people feel comfortable coming to work and being themselves; where everyone is afforded the same opportunities to achieve their personal and professional goals; and where everyone is encouraged to develop, grow and achieve their full potential.

We are committed to respecting human rights throughout our company. We believe the protection of human rights is fundamental to conducting great business, and believe we have both the ability and responsibility to drive positive change through our culture and business practices.

It is our policy to comply with all applicable laws that provide equal employment opportunities for all persons and to prohibit unlawful discrimination.

---

### Human Rights Guiding Principles

CBIZ adheres to the following principles:

**Minimum Age for Employment:** we do not tolerate the use of child labor. We support our employees' rights under labor and employment laws and regulations. We prohibit the employment of anyone under the legal working age as defined by local law.

**Abuse and Harassment:** we prohibit the use of corporal punishment, sexual harassment or other forms of physical, mental, or verbal abuse.

**Discrimination:** we do not tolerate discrimination by reason of race, color, religion, national origin or ancestry, gender, gender identity, age, marital status, sexual orientation, status as a qualified individual with a disability, status as a disabled or protected veteran, union affiliation, genetic information, sex, creed, citizenship status or any other factor prohibited by law.

**Freedom of Association:** we recognize and respect the rights to freedom of association.

**Working Hours and Wages:** we ensure that working hours are reasonable and provide fair and equitable wages and other employment conditions in accordance with applicable laws. We provide employees with clear written information on their pay and conditions. We do not permit unlawful deductions from wages as a disciplinary measure. We are an equal opportunity employer and are committed to equal pay and benefits for equal work regardless of gender.

**Health and Safety:** we require working conditions in compliance with all applicable laws, including US OSHA and the laws of other jurisdictions where we conduct business, regardless of geographic location, regarding worker and occupational health and safety.

**Bribery:** we prohibit improper payments in the conduct of our business and expect full compliance with the U.S. Foreign Corrupt Practice Act and all other applicable anti-corruption laws. Limitations on permissible payments to clients or prospective clients are set out in our Associate Handbook. Employees are provided with annual training on these expectations which are reviewed and monitored by our internal audit department.

**Recruitment of Workers:** we require labor recruitment and employment procedures to be carried out in a legal and ethical manner.

**Water and Sanitation:** we aim to understand and, where relevant, address water access risk, respecting everyone's right to safe, accessible, and affordable water.

**Forced Labor and Modern Slavery:** we will not use any forced, bonded or involuntary labor. Employees are not required to lodge deposits or identity papers and may leave in accordance with applicable law by giving reasonable notice and receiving all wages due and owing. We have a zero-tolerance for any human trafficking.

*(continued on page 27)*

---

## HUMAN RIGHTS POLICY

**Corporate Funds:** we will not use corporate funds for individual political campaigns.

**Code of Conduct and Ethical Expectations:** We expect our employees and contractors to exercise the highest degree of ethics in all actions they undertake on behalf of CBIZ. Employees are provided with annual training on these expectations which are reviewed and monitored by our internal audit department.

**Diversity and Inclusion:** we are committed to fostering, cultivating and preserving a culture of diversity and inclusion that welcomes, values, respects, and supports our individual differences and similarities.

### Application, Administration and Governance

We seek to respect human rights across our business regardless of geographic location. This Policy applies to CBIZ, Inc. and all of its subsidiaries and business partners including but not limited to employees, suppliers, vendors, contractors, and rights holders such as the following: women, children, indigenous populations, minorities, and people with disabilities. Further, we will not knowingly conduct business with partners such as suppliers, vendors, and contractors who violate this Policy.

This Policy and all statements herein – including any recommended changes or updates – are (or, as applicable, must be) approved by the CBIZ Board of Directors and CBIZ Executive Team who oversee the implementation of this Policy and are also responsible for monitoring and the overall governance compliance of this Policy.

### Grievance and Remediation

We are committed to addressing any adverse human rights issues we have caused or to which we have contributed, and expect our vendors and business partners to do the same.

We provide several ways for employees to raise concerns or complaints. This includes the reporting of potential misconduct to managers, Human Resources, the Legal Department and our CBIZ Employee Ethics Hotline.

The Ethics Hotline is available 24 hours a day, seven days a week. Callers may remain anonymous and any employee who reports possible or actual wrongdoing in good faith will not be retaliated against. Complaints can be reported by calling 1-866-255-2611 or by visiting [www.securityvoice.com/reports](http://www.securityvoice.com/reports).

The CBIZ Internal Audit Department will provide the Audit Committee with a report of all complaints received and the results of its investigation.

### UN Global Compact

With respect to labor and employment matters, we endeavor to adhere to the following principles set forth in the UN Global Compact:

PRINCIPLE 1: Businesses should support and respect the protection of internationally proclaimed human rights.

PRINCIPLE 2: Businesses should make sure that they are not complicit in human rights abuses.

PRINCIPLE 3: Businesses should uphold the freedom of association.

PRINCIPLE 4: Businesses should uphold the elimination of all forms of forced and compulsory labor.

PRINCIPLE 5: Businesses should uphold the effective abolition of child labor.

PRINCIPLE 6: Businesses should support the elimination of discrimination in respect of employment and occupation.

PRINCIPLE 7: Businesses should support a precautionary approach to environmental challenges.

PRINCIPLE 8: Businesses should undertake initiatives to promote greater environmental responsibility.

PRINCIPLE 9: Businesses should encourage the development and diffusion of environmentally friendly technologies.

PRINCIPLE 10: Businesses should work against corruption in all its forms, including extortion and bribery.

# APPENDIX B

## Enterprise-Wide Training Brochure

CBIZ

# Enterprise-Wide Training



Accounting | Insurance | Advisory



# CBIZ Enterprise-Wide Training

## Table of Contents

2-3 ..... HR  
 4-6 ..... Financial Services  
 7-8 ..... Benefits & Insurance  
 8-9 ..... CBIZ Women's Advantage  
 9 ..... Additional Training Programs

## HR: Learning & Professional Development Programs

### Diversity & Inclusion (D&I)

D&I education is required for all CBIZ team members on an ongoing basis. This includes completing a three-part series designed by CBIZ.

- Part 1: Why Diversity and Inclusion Matters for CBIZ
- Part 2: Understanding Unconscious Bias and Its Impact in the Workplace
- Part 3: Creating an Inclusive Culture at CBIZ: Identifying and Disrupting Microaggressions at Work

The following are also available:

- The D&I Expanded Learning Series provides a deeper dive into diversity and inclusion topics through focused reading and moderated virtual breakout sessions.
- The D&I "Our People Matter" Speakers Series features acclaimed authors and speakers who share experiences to expand recognition and learning
- A variety of books, films and other resources are featured on a dedicated D&I portal on CBIZ Central



## Enrichment Series

The Enrichment Series is a collection of programs designed to support and enhance the personal and professional growth of our team members. The following courses are CBIZ-developed and led by CBIZ HR Business Partners:

### Supervisory Skills

- Effective Performance Management Systems
- Effectively Conducting the Disciplinary Process
- Emotional Intelligence
- Managing Generational Differences

### Leadership

The following is a sample of over 70 courses available as classroom or self-paced e-learning modules in the MyLearn library.

- Managing and Leading Others
- Problem Solving and Critical Thinking
- Time and Project Management
- Communication

### Customer Service

Miller Heiman Group-authored courses build critical service skills to aid our team members in the attainment and retention of loyalty among our clients. A sampling of the courses:

- Reaching for Stellar Service
- Caring for Customers
- Teaming Up for Seamless Service

There are also related modules for those who supervise our customer service professionals.



## Personal Work Skills

There are numerous CBIZ-developed courses led by our HR Business Partners designed to assist team members of any level to build skills and strategies in order to be even more productive and successful. A sampling of the courses:

- Succeeding Amidst Generational Differences
- Listening in a Hectic World
- Speaking to Influence Others
- Personal Strategies for Navigating Change
- In addition, team members may search the MyLearn library for self-paced e-learning courses by entering a competency or topic to see what is available.

## MyLearn (Learning Management System)

This platform allows us to offer and track training across the enterprise, as well as develop career paths for our team members. It is a one-stop shop for onboarding, compliance courses, self-study courses, webinars, tutorials and training resources, and includes a calendar with registration capabilities for instructor-led sessions. MyLearn includes a direct link to MyCPE, our system which houses Continuing Professional Education (CPE) credits for our Financial Services team members.

## Presentation Skills Workshop

In this workshop, participants learn how to effectively and quickly develop well-organized presentations. They learn how to create and maintain a positive impression throughout the presentation and deliver presentations with impact, including general guidelines, handling nerves, answering questions effectively and designing visuals. The small class size allows each person to deliver presentations and receive constructive feedback from the facilitator.

## State-Specific Harassment Prevention Training

A growing number of states in the U.S. require specific training in addition to CBIZ-required training for harassment prevention. Our Corporate HR Learning & Development team oversees this training and assigns as applicable to ensure compliance.

## Financial Services: Learning & Professional Development Programs\*

### Core National-Level Technical Learning

These instructor-led programs provide technical training in audit and accounting (A&A) and/or taxation for external client-facing employees below the manager level. Levels 1-3 are intended for Associates with two years or less of experience. The Senior Associate Conference includes a mix of general sessions, electives and sessions based on experience level.

- Level 1: For Associates with zero to three months of A&A and/or tax experience who have not yet been through a busy season.
- Level 2: For Associates with approximately one year of A&A and/or tax experience and who are still primarily working under the supervision of others.
- Level 3: For Associates with approximately two years of A&A experience (who are managing or preparing to manage their own engagements with minimal supervision and are supervising or preparing to supervise others) and/or tax experience (who are preparing more complicated returns, reviewing basic returns, interfacing with clients and beginning to research and assist with tax planning engagements).
- Senior Associate Conference: For Senior Associates with approximately three or more years of A&A experience (who have been managing their own engagements and/or have been supervising others) or tax experience (who have been preparing complicated returns, reviewing basic to intermediate returns and have completed more complex research and planning projects). A&A Senior Associates generally attend the Senior Associate Conference until promoted to Manager. Tax Senior Associates attend the entire conference for three years and then may attend the electives and general session in subsequent years until promoted to Manager.

### MHM Technical Symposium

This A&A technical conference is primarily designed for attest practice Managers and Senior Managers, although attest Shareholders may also attend. The symposium includes a combination of general session topics and electives based on industry and/or specialized accounting or auditing issues.\*

### Tax Manager Symposium

This technical conference is intended for all tax Managers and Senior Managers. The program covers advanced technical topics that impact our clients in various areas of taxation. Attendees will build knowledge and consultative skills that will enable them to add value to our clients. In lieu of the Symposium, tax Managers and Senior Managers may be invited to the tax portion of the CBIZ & MHM Biennial Conference (discussed on next page).

### Technical Webinars & Self-Study Libraries

Financial Services provides over 50 technical webinars, covering accounting, auditing, tax and industry-focused topics. In addition, employees have access to various self-study libraries, offering hundreds of courses to further develop one's technical skills.

### Associate Professional Development & Senior Professional Development Programs

These are nationally developed, locally delivered programs designed to supplement Core National-Level Technical Training by providing a platform for the growth of Associates and Senior Associates as professionals and leaders.

- The Associate Professional Development program offers Associates a smooth transition from school to the professional world, focusing on issues such as time management, receiving feedback and preparing for busy season.
- The Senior Professional Development program assists Senior Associates in developing strong client, internal and external relationships, focusing on issues such as delegation, giving feedback and goal setting.





## Accelerate

Accelerate is a blended learning program that helps Associates through Senior Managers develop consultative and business development skills. The program focuses on 12 core skills understood to be characteristic of successful consultants and business developers, presented in a context appropriate for their level. Accelerate features multiple points of contact, utilizing a unique blend of self-paced, social and experiential learning.

## Manager Professional Development

### New Manager Orientation

This program is designed for all newly hired and newly promoted Managers. The curriculum focuses exclusively on professional development and covers such topics as Making the Transition to Manager, Delegation, Increasing Communication Success with DISC, Proactive Client Service and Giving Feedback. The session is highly interactive and uses group projects and presentations to facilitate learning.

### Experienced Manager Workshop Series

These workshops are intended to help experienced Managers and Senior Managers further build the behavioral skills necessary to succeed in that role. Each workshop focuses on one core skill and vary from year to year. Previous workshop topics have included presentation skills, delegation for employee growth, and productive conflict and crucial conversations. All experienced Managers and Senior Managers are generally expected to attend at least one workshop per year.

## Emerging Managing Director Academy (EMDA)

This five-session program is intended for Senior Managers and Directors who have shown the potential to become Managing Directors (MDs). The program is designed to ensure the candidates have clear awareness of the skills, knowledge and expertise required to make a successful transition and achieve both personal and professional success as an MD. Over the course of the program, the candidates will focus on the MD competencies, including self-development, leadership development, business development, organizational awareness and business skills. EMDA candidates are nominated by their Senior Managing Director and approved by CBIZ & MHM leadership.

## CBIZ & MHM Biennial Conference

This event is designed for Financial Services Directors/ Shareholders and up. At this conference, leadership makes presentations on the “state of the union” and shares visions of our business strategy. For those in the Attest and Tax practices, the curriculum also includes a variety of high-level technical topics blended with sharing of internal best practices, provided in both a general session and breakout-session format. Participants also gain the opportunity to hear from and network with leaders of other CBIZ business segments, which ultimately assists in better serving our clients.

## Career Advisor Program

This program fosters employee growth by facilitating learning and development opportunities, coaching and feedback. External client-facing staff are typically assigned a Career Advisor within six months of employment. Advisors and advisees meet regularly to set performance and development goals, discuss progress toward those goals and maximize the value of formal and informal learning and development opportunities.

## Internship Program

In many locations we offer Spring and Summer internships for students considering a career at CBIZ & MHM. They receive the same experience as our full-time team members. During their internship they gain experience in tax and A&A work. We also work with them on socialization and goal setting and pair them up with buddies and mentors to help set them up for success. Our goal is to extend employment offers to our interns and have them move up through the company as their careers progress.



## CPA Designation Support

CBIZ encourages associates to attain their CPA designation and provides support for those who opt to do so. CBIZ has a direct-pay arrangement with our vendor for a review course and compensates the associate in accordance with their regular base wage while taking the CPA exam (up to 32 hours) if the exam is taken during the normal workweek. CBIZ reimburses the associate for up to four application fees, the exam fees for up to eight sections, required fingerprinting fees, mileage associated with the commute if outside the metro area, lodging and meals if an overnight stay is required, and one instance of the AICPA Professional Ethics self-study course or state equivalent (as applicable). CBIZ awards a CPA exam bonus between \$2,000 and \$4,000.

## Valuation Designations Support

CBIZ encourages our Valuation practice employees to pursue the following designations, as applicable:

- Real Estate Valuation Appraisal Trainee
- State Certified General Appraiser
- Member of the Appraisal Institute (MAI)
- American Society of Appraisers (ASA)
- Business Valuation Appraisers
- Business Valuation Professional AM or ASA Accreditation
- Machinery and Technical Specialties (MTS) AM or ASA Accreditation
- American Society of Appraisers (ASA)
- Certified Entity and Intangible Valuations (CEIV) Credential
- CFA Institute Chartered Financial Analyst (CFA)

CBIZ reimburses expenses without regard to scores received for up to two exam application and testing fees, mileage associated with the commute to and from a testing site location outside of metro areas, lodging and meals if an overnight stay is required, and if the class is not offered in the local area of the employee an alternative location will be reviewed. In addition, a bonus is awarded to each eligible employee who successfully completes these designations as a regular full-time or part-time employee: Certified General Appraiser Designation \$2,500, MAI Designation \$5,000, ASA designation \$4,000, CEIV designation \$2,500 and CFA designation \$5,000.

## Benefits & Insurance

### Leadership Development

The leadership development courses are offered across the country both in person and virtually and are required for anyone who holds a management or supervisory position. To complete each course successfully, application of the information learned must be demonstrated.

#### Foundations of Management

Foundations of Management focuses on helping leaders address the key opportunities and challenges when managing individuals. This very intense course covers the entire performance management cycle, which includes interviewing, performance planning, coaching, counseling and performance appraisal meetings.

#### Foundations of Leadership

Foundations of Leadership builds on the knowledge learned in Foundations of Management and focuses on areas of leading individuals that are more complex. Included in the class is a discussion of a variety of leadership models, creation of a personal leadership philosophy and learning a variety of tools to approach daily leadership challenges, including managing priorities, delegation, giving and receiving feedback, and building a strong, positive culture, as well as an introduction to both change and conflict resolution.

Additional development opportunities include:

- Presenting Virtually
- Building a High Performing Team
- Coaching-the-Coach Certification
- Training-the-Trainer Certification

### Professional Development

Online development opportunities focusing on key topics, ranging from communication to project management to negotiation, are provided to all in our “Professional Development Toolboxes.” Articles, videos, assessments and book recommendations are included.

### Organization Development

Coaching is offered for leaders across the division to strengthen effectiveness and provide additional growth opportunities. Approval is required.

Customized teambuilding is provided to teams who seek to improve, grow and strengthen.

## CBIZ HCM

Through the CBIZ HCM Training Program each associate is assigned to a training curriculum based on their position. Each curriculum contains specific training requirements necessary to become an expert in their role. The extensive training library consists of courses ranging from department/job specific to customer service and soft skills. The training classes include instructor-led, on-the-job, seminars and computer-based training. In addition, mentoring and study materials are offered to assist individuals in preparing for their CPP or FPC certification exams.

Additionally, the American Payroll Association has approved 32 CBIZ Payroll courses for recertification credits. Each year, Approved Provider status is designated by the American Payroll Association through an application process. CBIZ continually meets the criteria to become an Approved Provider, allowing us to issue recertification credit hours to associates or clients. CBIZ HCM also offers employees the opportunity to obtain their SHRM-CP, SHRM-SCP and CPA designations.

## CBIZ Benefits & Insurance Services Sales & Training Conferences

These biennial two-day events focus on professional development, specifically business development and industry updates. In addition, every other year each Benefits & Insurance Services business (Employee Benefits, Human Capital Management, Talent & Compensation Solutions, Retirement & Investment Solutions and Property & Casualty) holds a sales and training conference focusing on industry-specific content.



## CBIZ Employee Benefits

Our Employee Benefits division offers a national training program for our employees called Benefits U. This program focuses on technical training and ongoing enrichment, with a continued goal of helping to better align our sales and service teams with a national approach, giving more consistency to our team members and our clients.

This program is designed to take an employee from the day they are hired through the day they retire. Trainings are offered regularly. Some are prerecorded and assigned through MyLearn; others are hosted live to allow for more interactive Q&A and placed into a library for future reference. Below are a few of the trainings offered through Benefits U:

- **Featured Client Friday** – Local offices from around the country present client case studies, showcasing the work we've done for them. In addition to lending greater awareness to the depth of our national client base, this allows us to highlight the great work our client service teams are doing and learn from each other in the process.
- **National Client Service Training** – These trainings focus on both technical and enrichment topics and are dedicated to the development of our client service team. Trainings are led by team members and are hosted live to promote collaboration and accommodate Q&A.
- **National Sales Training** – These trainings focus on both sales knowledge and system topics dedicated to helping sales professionals meet their annual goals. Topics are developed based on feedback received from our team members. Trainings are held live to promote collaboration and accommodate Q&A.
- **Client Service Academy** – This is a program designed to assist CBIZ with recruiting and retention efforts, starting with the entry-level position of Account Coordinator. The Academy was developed to provide greater training and development of our early-career team members and further our division's ongoing goal of increasing consistency and integration. Additionally, the Academy is designed to create a pipeline of talent for future client service positions within CBIZ Employee Benefits.

## CBIZ Women's Advantage

CBIZ Women's Advantage (CWA) celebrates the uniqueness of the woman business professional. Internally, we direct the development of our women professionals through focused leadership, mentoring and networking, as well as personal and professional development. Following is an overview of the development programs.

### Spark: CWA Personal Growth Series

The focus of Spark, formerly Networking Circles I, is personal development, designed to create a support network that builds self-confidence and skill building among early to mid-career women at CBIZ. The program is 8-9 months, involving a series of facilitated small-group meetings. This program includes:

- Goal Setting
- Developing and Strengthening Influence Skills
- Effective Communication Skills: Listening
- Effective Communication Skills: Presentation Techniques
- Managing Success in Your Professional and Personal Life – Planning, Prioritizing, Work Practices, Boundaries, Delegation
- Managing Success in Your Professional and Personal Life – Work/Life Roles and Integration, Time Management, Goals
- Advocacy: Marketing Yourself and CBIZ



CBIZ

## Ignite: CWA Professional Growth Series

The focus of Ignite, formerly Networking Circles II, is the professional development of CBIZ women who are emerging business developers and client-facing professionals. The program is designed to develop or further enhance client service and business development skills, leading to revenue growth of CBIZ. Ignite is a 9-month program, involving a series of facilitated small-group meetings. This program includes:

- The CBIZ Trusted Advisor
- Salespeople and Sales Styles: Born or Made?
- DISC: Understanding Your DISC Reports – Your Natural Behavior Tendencies
- DISC: Adapting Your Selling Style to Fit Your Customer's Buying Style
- The Trust Equation
- From Difficult Conversations to Learning Conversations
- Resolving Objections
- Resiliency
- Your Path to Success

## Enlighten: CWA Personal Growth Series

CWA believes that absorbing content from impactful books or articles can challenge and inspire us, yet the experience is not complete until you've shared your thoughts with someone else! Enlighten, formerly Book Clubs, is open to any CBIZ team member. Participants commit for one year. Content is focused on professional development topics, and selections are made by series participants. CWA purchases the books and the leader is selected from among the group.

## MasterClass Series

These include quarterly live webinars intended to educate, inspire and promote growth in leadership competencies among all CBIZ team members. Recordings may be accessed in the MyLearn library.

## Additional Training Programs

### QuickHelp

Select "QuickHelp" under Applications on CBIZ Central to access your personal BrainStorm QuickHelp portal for training on Microsoft Office 365. Features include video content, assessments, live events and more. And, you can earn badges and compete with other team members for a place on the leaderboard!

### United Training

CBIZ partners with United Training to provide a national discount to a variety of end-user application and technical training. Details are available at CBIZ Central > My Resources > Employee Materials > Training & Professional Development.

### HCM: CBIZ HR Information System

HCM is our Human Resources information platform. Training about HCM, as well as goal setting, performance documents and other user guides are available on the Training & Professional Development page on CBIZ Central.

### Social Media

Access CBIZ Central > Corporate > Marketing > Social Media to learn about various CBIZ social media, guidelines for sharing thought leadership pieces and tips for safe social networking. In addition, there are numerous educational programs, such as:

- Digital Marketing Orientation Video
- How to Use Social Media for Business Development
- How to Use Frontline Selling
- How to Participate in the CBIZ Twitter Program
- LinkedIn: How to Utilize Proven LinkedIn Techniques
- Setting Up Your Digital Email Signature





**Accounting | Insurance | Advisory**

*\*MHM (Mayer Hoffman McCann P.C.) is an independent CPA firm that provides audit, review and attest services, and works closely with CBIZ, a business consulting, tax and financial services provider. CBIZ and MHM are members of Kreston International Limited, a global network of independent accounting firms.*

# APPENDIX C

## Recognized Professionals

# CBIZ Celebrates Our Recognized Professionals

CBIZ is proud to recognize our team members for their commitment and dedication to their clients, professions, communities and diversity. We are proud to honor our remarkable professionals who are recipients of select 2021 awards and thank them for helping to make CBIZ a success.



**Ben Anderson**  
40 Under 40 in Kansas City  
*Ingram's Magazine*



**Lindsey Benson**  
40 Under 40  
Construction Financial  
Management Association  
(CFMA)



**Jeffrey Booker**  
NFBPA's Corporate  
Person of the Year  
National Forum for Black  
Public Administrators



**Cheryl Calhoun**  
– Minorities of Influence: CPAs  
– Leaders of Influence:  
Women in Accounting  
*Los Angeles Business Journal*



**Doug Coleman**  
CWA Champion for 2021  
*CBIZ Women's Advantage*



**David Diamond**  
Top 500 Executives  
*San Diego Business Journal*



**Jennifer Gage**  
2021 Top Women Advisors  
National Association of  
Plan Advisors



**Heather Hernandez**  
Business Women  
of the Year Awards 2021  
*San Diego Business Journal*



**Jack Keller**  
Top Retirement  
Plan Advisors Under 40  
National Association  
of Plan Advisors



**Betty Liu**  
Leaders of Influence:  
Women in Accounting  
*Los Angeles  
Business Journal*



**Paul Nation**  
Top 500 Executives  
*San Diego Business Journal*



**Caitlyn O'Neil**  
Everyday Heroes and  
Heroines Award  
*Colorado Society of CPAs*



**Kelly O'Neil**  
Leaders of Influence:  
Women in Accounting  
*Los Angeles Business Journal*



**Cindy Orr**  
2021 Top Women Advisors  
National Association of  
Plan Advisors



**Jim Parks**  
500 Most Influential  
Leaders and Executives  
*Los Angeles  
Business Journal*



**Jeffrey Perlman**  
Annual Honoree – NJTL  
National Junior Tennis  
and Learning



**Veronica Quintana**  
Top 50 Women in Business  
*Pacific Coast Business  
Times*



**Gail Roth**  
Notable Woman in  
Accounting and Consulting  
*Crain's*



**Nathan Story**  
40 Business Leaders  
Under 40  
*San Diego Business Journal*



**Nichelle Santos**  
NFBPA's Corporate  
Person of the Year  
National Forum for Black  
Public Administrators



**Carolyn Watley**  
William F. Yates Medallion  
for Distinguished Service  
*William Jewell College*



# APPENDIX D

## Employee Benefits Program



# CBIZ Employee Benefits Program



## PURPOSE

- 529 Plan
- Education Assistance Program
- Employee Assistance Program
- Service Anniversary Program



## SOCIAL

- Flexible Work Arrangements
- Paid Time Off
- Parent Program
- Pregnancy Disability Leave
- Parental Leave
- Holiday Savings Plan
- Great People, Great Place



## FINANCIAL

- Salary Continuation
- Long Term Disability
- Cafeteria Plan
- Health Savings Account
- Transportation Fringe Benefit
- Retirement Plan
- Group Life and AD&D
- Voluntary Life, Accident and Critical Illness Plans
- Travel and Accident Insurance
- Employee Stock Purchase Plan
- LifeLock
- IonTuition
- Personal Insurance Services
- TrueConnect



## COMMUNITY

- CBIZ Cares
- CBIZ Women's Advantage
- Care Advantage: SitterCity
- Care Advantage: Years Ahead
- LegalShield
- PetAssure
- Green Team



## PHYSICAL & EMOTIONAL

- Medical
- Pharmacy
- Rx Savings Solutions
- Rally Wellness Program
- Dental
- Vision
- Discount Vision Plan



**100+** Offices

**6,000+** Team Members

**82,000** Clients



**93** Workplace Awards in 2021

## OUR SERVICES

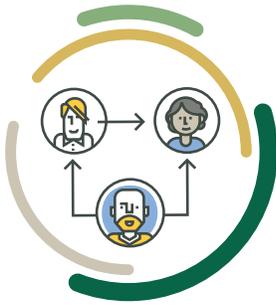


**FIND YOUR PERFECT FIT**



## PURPOSE

Liking what you do each day and being motivated to achieve your goals



## SOCIAL

Having a strong sense of community at work as well as supportive relationships and love in your life

**Service Anniversary Program:** The Service Anniversary Program is designed to recognize and celebrate each of our team members as they reach their milestone service anniversaries. The hard work and dedication by our team provides critical support to our clients and helps CBIZ to grow; for that, we are truly thankful.

**Employee Assistance Program:** Provides confidential assessment, short-term counseling and referral services for employees and family members in need of assistance with personal matters.

**Education Assistance Program:** Provides for reimbursement of eligible tuition expenses on a pre-tax basis.

**529 Plan:** Provides the opportunity to save for future higher education expenses through payroll deductions. **Flexible Work Arrangements:** CBIZ offers arrangements that allow associates the opportunity to modify workloads or work schedules to support personal commitments while maintaining the highest quality service.

**Paid Time Off:** CBIZ offers paid time off for traditional holidays, sick time and vacation time each year.

**Parent Program:** Our Parent Program provides additional support and assistance to new and existing mothers and fathers as they navigate preparing for a new child and managing any challenges that may occur while coming back to work after an extended leave as it relates to children.

**Pregnancy Disability Leave:** Paid leave of absence for the purpose of recovery from the birth of a newborn child.

**Parental Leave:** Paid leave is available to both men and women, including associates in common-law relationships, regardless of whether those relations are of persons of the opposite or same sex, after the birth or adoption of a child.

**Adoption Leave:** Paid adoption leave is available to an eligible associate to provide parental care associated with the adoption of a minor child for bonding purposes.

**Holiday Savings Plan:** Employees choosing to participate make automatic payroll deductions into a savings account that earns interest. Funds may be used for holidays or vacations!

**Great People, Great Place:** The commitment to our people means making CBIZ a great place to work. With this philosophy in mind, we established our *Great People, Great Place* (GP2) program in 2006. GP2's mission is to ensure that, together, our leadership and environment create a place of which our team members are proud.



## FINANCIAL

Effectively managing  
your economic life  
to reduce stress and  
increase security

**Salary Continuation:** Provides partial income per week for up to 180 days in the case of illness or accident.

**Long Term Disability:** Provides partial income continuation after 180-day elimination period while continuously disabled, up to normal retirement age.

**Cafeteria Plan (Section 125):** Provides pre-tax savings for reimbursement of medical, dental and vision expenses not covered by insurance, adoption expenses and dependent daycare expenses.

**Health Savings Account (HSA):** CBIZ offers payroll deductions to an HSA, allowing you to save money on a pre-tax basis to pay for qualified medical expenses you incur while meeting your QHDP deductible.

**Transportation Fringe Benefit (Section 132):** CBIZ allows you to save money on a pre-tax basis to cover parking expenses at or near your office or mass transit expenses you incur to commute to work.

**Retirement Plan:** Employees contributing to the CBIZ retirement plan make automatic payroll deductions into investment accounts and enjoy a competitive matching contribution following one year of service.

**Group Life and AD&D:** Term life insurance and accidental death and dismemberment benefits for your beneficiary in the case of your death or permanent injury while employed.

**Voluntary Life, Accident and Critical Illness Plans:** CBIZ offers Voluntary Life, Dependent Life, Long Term Care, Accident and Critical Illness Insurance.

**Travel and Accident Insurance:** Personal insurance coverage available while traveling on authorized company business.

**Employee Stock Purchase Plan:** Employees can purchase CBIZ stock at a discounted price through the convenience of payroll deduction.

**LifeLock:** LifeLock helps protect your identity and credit by monitoring for identity theft and threats.

**Personal Insurance Services:** Professionals who review your existing policies, provide recommendations for improving coverage where applicable (while often times improving your rates) and offer you peace of mind knowing you are adequately insured.

**TrueConnect:** TrueConnect™ is a voluntary benefit program that provides safe, small-dollar loans to help you through a tough time. Loans from \$1,000 to \$5,000 are available to qualifying employees and are conveniently repaid through automatic payroll deductions for no longer than 12 months.

**IonTuition:** IonTuition eases the stress of repaying student loan debt and planning for college. All employees are eligible for IonTuition's online student loan repayment management platform.



## COMMUNITY

The sense of engagement and involvement you have with the area where you live



## PHYSICAL & EMOTIONAL

Having good health and enough mental energy to get things that are important to you done each day

**CBIZ Cares:** Each year, CBIZ encourages all associates to volunteer up to five paid hours at a nonprofit organization selected by their CBIZ location.

**CBIZ Women's Advantage:** In partnership with our CBIZ Women's Advantage program, we sponsor an annual campaign to benefit Dress for Success, a nonprofit organization that provides professional attire for job interviewing. Additionally, the organization offers career/life counseling, technology training and mentoring support to thousands of disadvantaged women each year.

**Care Advantage:** Sittercity - A web-based resource to help you find babysitters, nannies, dog walkers, pet sitters and caregivers who can assist with special needs, companion care, homework help and housekeeping.

**Care Advantage:** Years Ahead - Profiles of senior care providers, including photos, details regarding their experience, capabilities, pricing and reviews to help you decide which provider is right for you and your family.

**LegalShield:** As a member of LegalShield, you have access to quality legal services through a nationwide network of provider law firms.

**Pet Assure:** Pet Assure saves you out-of-pocket veterinarian expenses without limitations or expensive premiums for office visits and medical procedures in over 3,000 locations nationwide.

**Green Team:** The CBIZ Green Team was established in honor of our commitment to developing practical and actionable solutions to support sustainable environments within each of our local offices.

**Medical:** CBIZ offers medical insurance for you and your dependents through United HealthCare. Identify health issues early and protect you and your dependents from the financial loss or hardship that can result from illness.

**Pharmacy:** CBIZ offers prescription coverage through CVS/Caremark; affordable medications for you and your dependents.

**Rx Savings Solutions:** Provides help with managing and saving money on prescriptions. This savings program is available at no cost to all members covered under the CBIZ medical plans.

**Rally Program:** Employees enrolled in a CBIZ-sponsored medical plan who choose to participate in the program receive discounted medical premiums.

**Dental:** CBIZ offers dental insurance through Delta Dental of Kansas. Good oral health is critical to the overall health of you and your dependents.

**Vision:** CBIZ offers vision insurance through Vision Service Plan; affordable voluntary coverage for you and your dependents.

**Discount Vision Plan:** If you choose not to enroll in the voluntary vision plan, you are eligible to receive a 15 to 20% discount on eye exams, contact lenses and prescription eyewear obtained through a participating VSP in-network provider.

# APPENDIX E

## CWA DFS Infographic

# CBIZ and CBIZ Women's Advantage – Proud Partners of Dress for Success

## About CBIZ Women's Advantage

- Established in **2007**
- **20 CWA board members** from across all business lines in 15 offices

“

We are so appreciative of our relationship with CBIZ Women's Advantage. With CBIZ's ongoing support over the last 13 years, our affiliates are extremely thankful to CBIZ employees for their generosity, enthusiasm, and support.

–JOI GORDON, CEO OF DRESS FOR SUCCESS WORLDWIDE



**DRESS FOR SUCCESS®**  
Going Places. Going Strong.

”

## CWA National Leadership



**LORI NOVICKIS**  
National  
CWA Leader



**SHERRY BURICK**  
CWA National  
Community Outreach  
Co-Chair



**AMY GRANT**  
CWA National  
Community Outreach  
Co-Chair



**Women's  
Advantage**

[cbiz.com/cwa](https://cbiz.com/cwa)

[cbizwomensadvantage@cbiz.com](mailto:cbizwomensadvantage@cbiz.com)

## CWA's Support of Dress for Success

- In 2021, CWA marks its **14th year** of partnering with DFS
- Monetary donations: **\$750,000+**
- Donated **more than 61,000** professional clothing items, accessories or toiletries
- 13 CBIZ women have served on boards of **11 DFS affiliates**

## Why CBIZ Women's Advantage & Dress for Success?

### CWA Goals:

- Professional development, mentorship, recognition, and career enhancement opportunities for our women professionals
- Help women succeed in business

### DFS Goals:

- Provide network of support, professional attire and development tools to help women thrive in work and life

# APPENDIX F

## Sustainability Policy

---

## SUSTAINABILITY, ENVIRONMENTAL RESPONSIBILITY, AND CLIMATE CHANGE POLICY

CBIZ is a professional services firm with no manufacturing or product distribution activities. Therefore, our environmental footprint is relatively small. However, we are committed to operating our business as a responsible corporate citizen consistent with principles supporting sound environmental management and concern for the well-being of our environment. We believe an appropriate balance between environmental goals and economic health can and should be achieved. This requires CBIZ operations and employees to support and achieve the following goals:

- Operate our offices in an environmentally sound manner.
- Conserve natural resources by recycling materials, purchasing recycled materials when practical, and reducing the amount of waste produced in the operation of our business.
- Reduce our impact on global climate change by encouraging lower greenhouse gas (“GHG”) emissions in ways including less frequent business travel, the use of digital technology to reduce the use of physical resources, and the adoption of programs to reduce waste generation.
- Reduce the use of energy by employing improved energy conservation and energy efficiency practices through the use of improved technologies and digital equipment, as well as employee education.
- Use natural resources in ways that foster sustainability and quality of these resources.
- We will make environmental responsibility and resource conservation an integral part of business management, and will support finding meaningful solutions to environmental concerns that may arise.
- We will reduce our impact on the environment through local operations’ initiatives.
- We will work to reduce the company’s carbon footprint, where possible, and to promote sustainable consumption.
- We will continue to promote our shift from print-based marketing and promotional materials to digital assets to help conserve natural resources.
- We will continue to utilize video conference meetings when practical to reduce GHG emissions and other effects of air travel.

CBIZ’s commitment to these goals includes the following specific elements:

- We are committed to “reduce, reuse, and recycle” programs at our offices. We will endeavor to reduce the use of, and promote recycling of, commodities such as paper, metals (e.g. aluminum) and plastic products.
- We will operate in an environmentally responsible manner and in compliance with environmental laws and regulations.

CBIZ makes sensible and responsible environmental management an important initiative for each of our employees and our local offices. Each CBIZ office is expected to manage its activities consistent with the goals of this Policy. Each CBIZ employee is expected to work toward these goals and is encouraged to (1) advise his or her supervisor promptly of any situation that may be in conflict with this Policy, and (2) propose any reasonable solution(s) that can support this Policy and further reduce CBIZ’s carbon footprint.

# APPENDIX G

## SASB Disclosures

## SASB DISCLOSURES

The Sustainability Accounting Standards Board (SASB) has established disclosure standards, by industry, relating to sustainability matters. We have considered SASB's Professional & Commercial Services industry standards in providing the disclosures below.

### Data Security

Data security is a top priority for CBIZ. As such, we strive to maintain appropriate data security standards and effective emergency and crisis management.

Our Chief Information Officer oversees an IT Security & Compliance Department dedicated to information security and enforcement of our Information Security Management and Administration Policy. Our policy applies to all employees, contractors and consultants, and all company sites and subsidiaries. The policy outlines our controls over data classification, privacy, protection and retention, including disaster recovery incident response, data breach incident response and security incident response procedures. We use threat and vulnerability management including routine testing to identify opportunities for improvement. We also provide data security training for all team members in addition to regular communications to reinforce data security awareness and vigilance.

The collection, usage and retention of client information required to provide our services is done according to applicable federal and state privacy, data protection and cyber security standards. CBIZ is subject to various state and federal regulations including, but not limited to, Sarbanes Oxley (SOX), Health Insurance Portability and Accountability Act (HIPAA) and the Health Information Technology for Economic Clinical Health (HITECH) Act. For additional information on how we collect, use and retain customer information, view our **Privacy Policy**, by visiting [cbiz.com/terms-conditions](https://cbiz.com/terms-conditions).

For additional information refer to the risk factors listed in Company's most recent annual and quarterly reports on Form 10-K and Form 10-Q filed with the Securities and Exchange Commission.

### Workforce Diversity

Below are percentages for workforce diversity among our team members and board of directors for 2021. For more information on our diversity and inclusion efforts, please refer to **page 12** of this report.

Workforce by Gender	
Male	47%
Female	53%

Workforce by Race/Ethnicity	
White	82%
Black or African American	5%
Hispanic or Latino	7%
Asian	5%
Native Hawaiian/ Other Pacific Islander	<1%
American Indian or Alaska Native	<1%
Multiracial	1%

Workforce by Generation	
Gen Z	7%
Millennials	41%
Gen X	34%
Baby Boomer	18%
Traditionalists	<1%

(continued on page 48)

Workforce Turnover	
Total	19%

Board of Directors by Gender	
Male	82%
Female	18%

Board of Directors by Race/Ethnicity	
White	91%
Multiracial	9%

### Workforce Engagement

Our more than 6,000 team members are the heart of the business, and we use companywide engagement surveys to gather feedback from our team on a routine basis. The resulting insights help to drive continuous improvement across our various employee programs as we strive to be our team members' employer of choice.

Each year we conduct two employee engagement surveys; one internal and one external, third-party survey. Each survey ultimately informs all aspects of employee engagement including learning and development, culture, recognition, flexibility, compensation and benefits. Throughout the year, we also conduct 'pulse' surveys on specific topics or as part of program changes to gather timely feedback from our team.

During 2021, CBIZ was certified as a *Great Place to Work*, and received 93 national and local workplace and health and wellness. In early 2022, CBIZ was recognized as one of **America's Best Midsize Employers** by *Forbes*. For more information on workplace awards and recognitions, see **page 10**.

### Professional Integrity

The success of CBIZ is directly tied to our reputation for integrity in the marketplace. We earn customer, team member, vendor, and investor loyalty and trust because we are honest, dependable, reliable and responsible. We aspire to the highest ethical standards (more than merely required by law or expected by others) because it is the right thing to do and makes good business sense. The CBIZ Code of Professional Conduct and Ethics outlines the ethical standards and behaviors we require for our team members. These standards include a team member's obligation to transact business fairly and honestly; to promote the Company's best interests without regard to personal interests; to safeguard all Company property and information and treat others' property and information with the same respect; to enhance the quality of life in the communities we serve; to treat people with dignity and care; and to comply with the law.

CBIZ has an Employee Ethics Hotline in place that is available 24 hours a day, seven days a week and employees are encouraged to anonymously report possible or actual wrongdoing or violations without fear of retaliation.

For more information on our approach to ensuring professional integrity, refer to the Ethics and Governance sections on **pages 7 & 8**, as well as the corresponding link to our **Code of Professional Conduct and Ethics** on our website.



At CBIZ, our commitment to corporate social responsibility ties directly to our mission, vision and values. We are committed to being an employer of choice and a place where our team members are proud to work, focused on being a premier provider of exceptional advice and solutions to our clients, and being good stewards of the communities in which we live and work. We are vigilant in our efforts to understand the needs of all our constituents and do our best to address those needs. Our core values guide our actions and decisions to be in the best interest of our people, community and environment.



[cbiz.com/about-us/corporate-social-responsibility](https://cbiz.com/about-us/corporate-social-responsibility)